

New IGT Research:

Understanding Multi-Channel Players



Do players' perceptions of lottery differ by sales channel? A new IGT global study seeks to understand how and why.

Lotteries around the world are at varying stages in their ability to access and optimize all the available sales channels to sustainably grow returns for good causes.

Yet, as lottery modernization continues, and despite regulatory obstacles to iLottery in some jurisdictions, it's likely that most markets will eventually serve – and need to understand – multi-channel players.

From mature multi-channel markets to nascent ones, the industry as a whole can benefit from insights on this developing player segment. What are the characteristics of multi-channel players? Why do some favor one channel versus another? What strategies could lotteries potentially pursue to encourage more cross-channel play? To serve this need, IGT set out to capture and convey a more detailed understanding of multi-channel players. The company's Global Marketing Insights team partnered with Russell Research in

2024 to invest in a **global thought leadership study**, the largest study the two organizations have fielded together to date.

Researchers surveyed a general population of adult consumers, not morally opposed to playing lottery, in **seven countries**: Australia, Canada, Czech Republic, Finland, Italy, Spain, and the U.S. **Among other topics, the quantitative phase of the research explored general lottery playership**

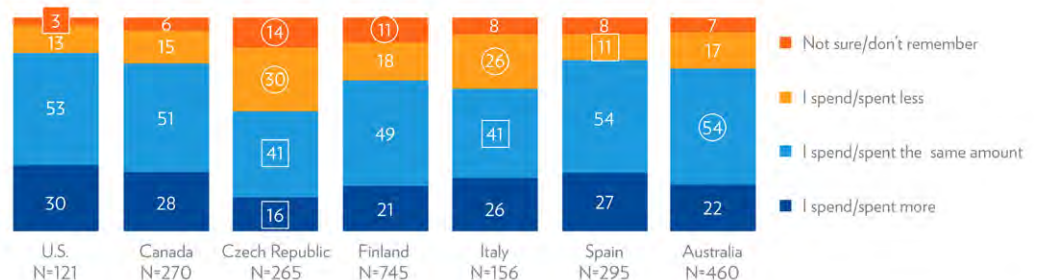
behaviors, especially as they relate to the differences between retail-only and digital-only lottery purchasers and digital/multi-channel lottery purchasers.

Special Report Preview

A new IGT Special Report, based on the research, aims to offer a data-driven understanding of player interactions across the various lottery sales channels, to support lotteries in navigating their

Lottery Purchase Channels – Online Purchasing Effect on Spending

“You indicated that you purchase/purchased your lottery game tickets online using a website or app at least some of the time. Which of the following statements best describes how your online lottery purchases have impacted your overall spending on lottery games?”



unique challenges. **A link to the IGT Special Report can be found at the end of this article.**

For lotteries already offering sales in the digital channel, it shares insights to further refine their channel strategy. Those anticipating regulatory approval for or preparing to launch online sales can use the Report's data and research to inform and shape a multi-channel strategy.

The insights can also help to inform lotteries' strategies for player acquisition and retention.

Of particular interest to PGRI readers is a finding relative to the U.S. market, where digital lottery sales have been authorized in only 15 states to date: While the U.S. currently has the lowest proportion of online players (13%) among the seven countries studied, 30% of American online lottery players indicated that they spend more money on lottery since they started purchasing online — higher than the percentage of players in Australia, Canada, Czech Republic, Finland, Italy, and Spain (see graph).

While the U.S. digital market is still maturing, there are opportunities for

lotteries that can't sell online to digitalize aspects of the retail lottery journey. IGT refers to this as **Connected Play**. Eventually, when regulated to sell via the online channel, **the lottery is better positioned to make the transition to an omnichannel environment**, and players are **already familiar with the ease of use and convenience** of interacting with the lottery digitally.

A set of Connected Play features built into IGT's OMNIA™ solution allows players to access a lottery mobile app to register, create, and use digital playslips at retail. Furthermore, players can check their tickets, claim their winnings, and enter second chance promotions right from their phones, among other convenience features.

For lotteries already selling online, Connected Play functionality provides **a complete view of players across channels**, supplying lotteries with valuable insights to help:

- make more informed decisions to strengthen game portfolios
- offer more tailored promotions and messaging

Methodology

The IGT study was conducted via online surveys from February 21 and April 15, 2024, in Australia, Canada, Czech Republic, Finland, Italy, Spain, and the U.S.

More than 7,000 surveys were collected (between 1,003 and 1,015 in each of the seven countries), encompassing three Lottery Player Segments: current/past-year lottery players; lapsed lottery players; and those who have never played draw-based lottery games or instant lottery games, but would be likely to consider playing lottery games in the future.

- apply modern and more cost-effective digital marketing techniques
- provide players with more information and resources to help them make informed decisions about playing, supporting Responsible Gaming efforts.

IGT's Special Report on multi-channel players explores what's happening in markets around the world and offers findings related to players' age group, purchase behaviors and attitudes, as well as how lotteries can cater to multi-channel players.

Visit [IGT.com/SpecialReport](https://www.igt.com/SpecialReport) to download the full report.

